Family Balance Summary Report

Last Modified on 09/13/2023 11:03 am EDT

The **Family Balance Summary** report provides you with a list of families with basic information and account balances based on filters (Search Criteria) you select.

You can find this report under the Families menu > Family Reports > Family Balance Summary.

- Customize your report to list family balances as of the current date (default setting) or for a historical date.
- * Determine inactive families that have balances due.
- * Send an email to all, or only some, of the families directly from the report results.



Save this as a frequently used report! Click the Heart icon \bigcirc next to a report name, the heart will change to red \bigcirc and the report will be listed under the Reports menu > My Reports for quick and easy access!

Search Criteria

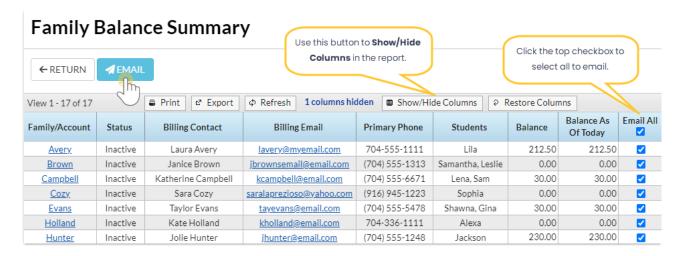
You can filter your list of families using any or all the Search Criteria, and Jackrabbit will compile a report of families who meet ALL of the criteria selected. For this example, we will filter for Inactive families.



Report Results

Review the results and use the checkbox in the last column to select the families to email. Click the *Email* button to quickly generate an email to all or the selected students in the report.

- Use the active links in the report to go to the Family record.
- Show/Hide the columns as needed. In this example, 1 column is hidden.
- Report results can be customized with the ability to sort columns, and modify column width.



Note: There are two *Balance* columns: *Balance* and *Balance* As *Of* (date). The *Balance* column is **not** date-dependent and is the current balance. The *Balance* As *Of* (date) column **is** date-sensitive and will vary depending on the search criteria you enter. In this example, **no** *Balance* As *Of* (date) was entered, and both columns show the same amount.



A history of emails sent from this report is kept in the Family record, Misc tab > View Sent Emails for 365 days.